TITLE: Distributed Call Center System and Method for Volunteer Mobilization

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CROSS REFERENCE TO APPLICATIONS

[0001]   This application is related to, and claims priority from U.S. Provisional Patent application no. 60/496,518 filed on August 20, 2003 titled "Distributed Call Center System and Method for Volunteer Mobilization", the contents of which are hereby incorporated by reference.

Technical Field

[0002]   The present invention relates to distributed call center systems and technology and particularly to low cost, web-base call center systems and methods for coordinating home-based volunteers.

Background Art

[0003]   Telephone call centers that handle large volumes of inbound or outbound telephone calls usually automate much of the process by using sophisticated, expensive automatic dialing and routing equipment, a pool of trained, professional agents and sophisticated, expensive software to manage the process.

[0004]   A typical use of such a call center is to initiate an outbound call campaign to contact a predefined group or segment of customers or potential customers that have a common attribute.   An example of a business or commercial call campaign may be contacting persons having credit card accounts overdue by 60 days.   A business or commercial call center typically handles such a campaign using a call center management system that identifies and downloads lists of appropriate telephone numbers which are fed to automatic phone dialers which then route connected calls to one of a pool of professional, qualified agents. Such systems are described in for example, U.S. Patent 6,549,769 to Harder

entitled "System and Method for Integrating Text Messaging to an Outbound Call System", the contents of which are hereby incorporated by reference.

[0005]   Some businesses operate virtual call centers in which calls are routed to agents at different geographic locations as described in, for example, U.S. Patent 6,553,113 to Dhir et al. entitled "System and methods for call decisioning in a virtual call center integrating telephony with computers", the contents of which are hereby incorporated by reference.

[0006]   Existing call centers and the call center management systems cater primarily to business and commercial enterprises that can afford a pool of trained, professional agents and the sophisticated hardware and software systems to effectively make and manage the calls and the support personal.

[0007]   There are other groups such as, but not limited to, grass roots political campaigns that would like to conduct telephone call campaigns but cannot afford the technology, the professional agents or the professional call centers.   These groups do however often have large numbers of volunteers.   However, these volunteers are often untrained, geographically dispersed and the only relevant technology they have access to is their basic telephone and Internet services.

[0008]   What these groups need to realize their telephone call campaign ambitions is a low cost system that can integrate and manage the efforts of geographically dispersed volunteer groups, enabling them to mount low cost but effective calling campaigns using simple and widely available technology such as the Internet and the basic telephone service.

Disclosure of Invention

[0009]   Briefly described, the present invention comprises a system and method to facilitate effective telephone calling campaigns by geographically dispersed individuals using the Internet and basic telephone services.

[0010]   In the preferred embodiment, a list of pre-qualified prospects is generated that includes at least the prospects telephone number and name and preferably an indication of their interest, or potential interest, in a relevant issue. Other information that may be gathered during pre-qualification includes, but is not limited to, the prospects address, age, marital status and political party affiliation. This prospect list may be generated by for instance, but is not limited to, a commercial automated voice-mail calling campaign or by reference to historical databases including, but not limited to, political party donor databases.

[0011]   The list of prospects may then be divided up amongst a group of volunteers. Each of the volunteers telephones the prospects on their list and leads them through a prepared script. The script may be customized to reflect the interests of, or information about, both the volunteer and the prospect. The script is typically designed to solicit further information about the prospects and to support from them, typically in the form of a donation, a commitment to vote in a specific way or commitment to act as a volunteer at an event. In a preferred embodiment of the invention the calls, the responses elicited and the appropriate follow-up actions are managed by a centralized, managing server and the web pages that the managing server generates. In a further preferred embodiment, the managing server uses Active Server Page technology to generate prospect-calling pages. The prospect calling pages typically include the pre-qualified prospects telephone contact number and whatever other pertinent information the database contains relating to the prospect. The prospect calling web page also typically presents the volunteers with pre-prepared scripts, customized to reflect known information about both the volunteer and the prospect. The prospect calling and has appropriate mechanisms for recording prospect responses and initiating appropriate follow up actions. These follow up actions may include, but are not limited to, sending pre-prepared e-mail or direct mail packages.

4

[0012]   In one embodiment of the invention the web site hosting the prospect calling page also has pages explaining the issue being campaigned, as well as the current assignment volunteers are working on. The web site may also have web pages giving background and status to the campaign as well as technical instructions for volunteers and help on volunteer strategy and technique.

[0013]   In a further embodiment of the invention the web site or the computer hosting the site may further monitor volunteer productivity and effectiveness in order to facilitate the most effective or productive list distribution.

[0014]   One of the advantages of the present invention is the ability for action groups to mount low-cost, effective campaigns to mobilize support for or against issues such as, but not limited to, legislation.

[0015]   The invention may be more fully understood by reference to the following drawings.

BRIEF DESCRIPTION OF DRAWINGS

[0016]   FIG. 1 is a schematic representation of a distributed call center.

[0017]   FIG. 2 is a schematic representation of a volunteer's welcome page.

[0018]   FIG. 3 is a schematic representation of a prospect call page.

[0019]   FIG. 4 is a schematic flowchart of a volunteer using the system.

[0020]   FIG. 5 is a schematic flowchart of the present invention managing a user interaction.

[0021]   FIG. 6 is an exemplary log-on page.

[0022]   FIG. 7 is an exemplary administrator's welcome page.

[0023]   FIG. 8 is an exemplary administrator's list overview page.

[0024]   FIG. 9 is an exemplary administrator's list management page.

[0025]   FIG. 10 is an exemplary administrator's script management page.

5

[0026]   FIG. 11 is an exemplary administrator's volunteer enrollment and assignment page.

[0027]   FIG. 12 is an exemplary administrator's volunteer management page.

[0028]   FIG. 13 is an exemplary volunteer's action page.

Best Mode for Carrying Out the Invention

[0029]   During the course of this description like numbers will be used to identify like elements according to the different views that illustrate the invention.

[0030]   Fig 1 shows a schematic representation of a web based distributed call center 10 comprising a call center management system 12 connected to at least one volunteer station 14 by a first communications network 16. The call center management system 12 includes a managing server 18 and associated prospect database 20 and volunteer database 22. In the preferred embodiment of the present invention the call center management system 12 is located to be geographically distant from the caller or volunteer stations 14. (The remote stations are termed 'volunteer stations' because, in political campaigns, the operatives typically volunteer their services to the campaign. It will be readily appreciated by one skilled in the art that the systems and methods described herein will function equally well if the operators of the volunteer stations are not volunteers but are compensated as professionals). The volunteer stations 14 typically comprise a data processing unit 23, a display device 24 and a communications device 26, preferably located in proximity to each other. The data processing unit 23 may be, but is not limited to, a personal computer, a personal digital assistant, a cable television set top box or a mobile telephone. The display device 24 may be, but is not limited to, the screen of a personal computer, the screen of a personal digital assistant, the screen of a television or the screen of a mobile telephone. The communications device 26 may be, but is not limited to, a telephone, a cellular telephone or a personal digital assistant (PDA) adapted for audio communication. The volunteer station 14 data processing

6

units 23 comprise suitable communications software and hardware, including any necessary

modems, to communicate with the managing server 12 via a first communications network 16

which may for example be, but is not limited to, the Internet or World Wide Web (WWW) or

wireless network connection.. The volunteer station communication devices 26 are able to

5   access prospect telephones 30 via a second suitable communications network 28 such as, but

not limited to the Public Telephone Network, a wireless network, a cable network or a

satellite network. The audio communications link between the communication devices 26

and the prospect telephones 30 may be a conventional telephone link, a voice over internet

protocol (VoIP) link, or some suitable combination of these. In a further embodiment of the

10   invention, the first communications network 16 and the second communications network 28

may be the same network or share parts of the same network.

[0031]   The distributed call center 10 architecture shown in Fig. 1 differs from

conventional call centers as described in for instance, but not limited to, U.S. Patent

6,553,113 to Dhir et al. entitled "System and methods for call decisioning in a virtual call

15   center integrating telephony with computers", the contents of which are hereby incorporated

by reference, in a number of significant ways. In conventional call centers, a key component

is an expensive automated dialing system used to make the initial calls from pre-sorted lists

to prospects. When the call connects to a prospect, further call management systems then

route the connected call to an available agent. In such systems the call initiation and

20   distribution is centralized even though the agents may be distributed. In contrast, in a

preferred embodiment of the distributed call center 10 of the present invention, the managing

server 18 does not participate in directly placing or routing calls. Instead, the managing

server 18 generates and makes available to the distributed volunteer stations 14, lists of

prospects and their related prospect identification information, including, for instance their

25   name and contact information. The managing server 18 also makes available at least one web

page, which may be customized to reflect known information about both the volunteer and the prospect, that presents coordinating information, which may include message templates in the form of calling scripts, to the volunteers via their display screens 24. Customized messages may be created from these message templates, either by the managing server 18, by the remote data processing unit 23 or by the operator of the communications device 26. In the distributed call center 10 of the present invention the volunteer (also know as "the operator") then initiates communication with the prospect using the communications device 26 and the prospect identification information. In a preferred embodiment, the operator may, for instance, initiate communication by dialing or placing a telephone call to the prospect. In this manner an inexpensive but effective telephone calling campaign can be launched using low cost, readily available hardware and the efforts of a distributed volunteer workforce, typically working out of their home.

[0032]   Although the exemplary embodiment of the invention described thus far comprises a telephone calling campaign, one skilled in the art will appreciate that the system would work using other communications protocols such as, but not limited to, instant messaging or e-mail exchanges or some combination of them.

[0033]   Fig. 2 shows a schematic drawing a welcome page 32 generated in the preferred embodiment of the invention. The page may be, but is not limited to, an Active Server Page (ASP) formatted in a formatting language, such as Hyper Text Mark Up Language (HTML), suitable for use on the Internet or World Wide Web (WWW). The page may be generated by, for instance, server software running on a suitable hardware platform. The welcome page 32 is formatted to display a number of elements of use to a volunteer in a telephone calling campaign. A name text box 34 shows the volunteers name and a message area contains welcoming message 36, which may be personalized. The welcoming message

8

36 is typically a brief, upbeat headline to orient the volunteer to the task. An example of a welcoming message 36 may be:

[0034]   *"Thanks for volunteering to help pass Empower the People's "Return the Money Amendment" to the New Jersey Constitution".*

[0035]   Other message areas that appear on the welcome page 32 in the preferred embodiment are an issue message 38 and an assignment message 40. The issue message 38 is typically a slightly more expansive outline of the issue that the current telephone calling campaign is addressing and may indicate where in-depth information about the campaign can be found and may also contain text designed to motivate or activate the volunteer to start telephoning. An example of a issue message 38 may be:

[0036]   *"We're working on the "Fiscal Fairness and Responsibility Act" – which is more commonly called the Return the Money Amendment. You can read more about the Amendment and its Progress to Passage by clicking on the appropriate box below. Alternatively, you can click on the big box at the bottom of this page to being making phone calls now."*

[0037]   The assignment message 40 is typically a tactical message, telling the volunteer what is being done on this particular day. The assignment message 40 may also indicated to the volunteer where they can find detailed information on technicalities such as volunteer instructions or volunteer strategy, as well as having motivational text designed to help integrate the volunteer into the group as well as to get the volunteer phoning prospects. An example of an assignment message 40 may be:

[0038]   *"Today we'll be working to organize supporters of the Return the Money Amendment in New Jersey's [#] State Legislative District. Before you begin, you may want to review our Volunteer Strategy or Volunteer Instructions, which you can do below.*

9

Alternatively, you can click on the big box at the bottom of this page to begin making phone calls now".

[0039]   Although the messages above have, for ease of description been described as text messages, one of skill in the art would appreciate that any suitable, web-compliant

5   multimedia-elements could be incorporated into such messages including, but not limited to, still and animated graphics in for instance, well known jpeg, mpeg, gif and avi file formats, audio clips in for instance well-known wave or mp3 formats and video clips in for instance the well-known mpeg3 or mpeg4 formats.

[0040]   The welcome page 32 also has links that may take the volunteer to other

10   suitable web pages. For instance action link 42, which may be a well-known hypertext link embedded in an HTML button, will signal the managing server to serve up a prospect call page 52. Other hyper links found in the welcome page 32 of the preferred embodiment include an "About issue" link 44, an "Issue update" link 46, a "Volunteer Instructions" link 48 and a "Volunteer Strategy" link 50. Clicking on one of these links typically causes a new

15   web page to be served up to the volunteer's computer. The new web page may provide detailed information, which may be customized to reflect known information about the volunteer, using for instance, well-known ASP technology and information from the volunteer database that the distributed call center management software maintains.

[0041]   Fig. 3 is a schematic view of a prospect call page 52 served up in the preferred

20   embodiment of the invention. The prospect call page 52 may be, but is not limited to, a customized HTML page created by ASP technology and may be customized to known information about the pre-qualified prospect and to the volunteer. In a preferred embodiment of the present invention, the prospect call page includes a heading 54, which may for instance be personalized to include the volunteers name and may include suitable links, dates and

25   times. The prospect call page 52 may also include information about the prospect to be

10

called including a prospect name 56 and a prospect telephone number 58. Other prospect

related elements that may be present include, but are not limited to, a prospect address,

including apartment or street number, street, town, state and country, details on if and when

the prospect was previously contacted, prospect age, gender and other appropriate

demographics.

[0042]   The prospect page then typically includes a number of text or script elements

60, 62 and 64. Each of the text or script elements is typically a personalized script containing

a question. For instance, text element 60 may read

[0043]   *"Hi, my name is JOHN. I'm a volunteer for Empower the People, the citizens*

group fighting to solve property tax problems. JOAN PROSPECT, our computer called your

home on 10/23/2002 at 21:23 and recorded that you said you'd be willing to sign our petition

to stop sky-rocketing property taxes. Do you agree that property taxes in PHILLIPSBURG

are too high?"

[0044]   Associated with the text element to be read by the volunteer are simple means

for recording the prospect's response. In the preferred embodiment the recording means are

single input check boxes labeled 'yes' or 'no'. In another embodiment of the invention, the

recording means may include more complex choices including, but not limited to, check

boxes or pull down menus including options for 'not sure', 'no comment' or other possible

response. Once the volunteer gets a response from the prospect, the volunteer checks the

appropriate box. This data may be sent immediately back to the call center managing system

12 or it may be stored locally on the volunteer station 24 and sent back later.

[0045]   The second text element 62 may be a pre-defined message sent at the same

time as the first text element. In one embodiment of the invention, the second text element

62 is only sent after a response to the first text element has been registered and the second

text element 62 may differ depending on what response is recorded. An example of a second

text element 62 may be

[0046]   "A big part of PHILLIPSBURG'S property tax problem is that

PHILLIPSBURG's residents pay millions in sales and income taxes to New Jersey's state

government in Trenton, but PHILLIPSBURG'S public schools and municipal government

don't get the state funding they deserve in return. Our group is working to pass legislation

that would make it harder for politicians to raise your state taxes, while returning more of the

state taxes you already pay for community. Would you support legislation that increases

state funding for your public schools and municipal government and lowers your property

taxes?"

[0047]   The second text element 62 may also have response buttons such as a 'yes'

check box 66 and a 'no' check box 68 associated with it.

[0048]   A third text element 64 may be part of the original script or generated as a

consequence of recorded responses to previous text elements. Example a third text element

are:

[0049]   "Would you, JOAN PROSPECT, be willing to sign a petition to Governor

McGreevey in support of such legislation?"

[0050]   "Would you be willing to ask your state legislators to support such

legislation?"

[0051]   A forth text or script element 70 illustrates a more complex, multi-conditional

type of statement or question requiring support for a more complex set of actions. Such a

statement may be similar to a salespersons "closer". An example of such a more complex

script element 70 is

[0052]   "If you are able to receive e-mail, I'd like to e-mail you information about the

legislation we're pushing together with a petition we would like you to sign in support of it,

12

and the names and phone numbers of your state legislators. JOAN PROSPECT, are you able

to receive e-mail?"

[0053]   Examples of more complex support buttons include element for recording an

e-mail address 72, which may be, but is not limited to, an HTML or Javascript textbox.

Other support buttons include an element for recording a direct mail address 74, and element

for recording a note 76, and element for choosing where to send the note to 78 and well as

function buttons for sending the note 80, for sending a prepackaged e-mail response 82 and

for initiating sending a pre-packaged mailer 84.

[0054]   A fifth text element 84 may be used for sending a closing message. As with

all the other text elements, closing message 84 may be present when prospect call page 52 is

first opened or delivered or it may be generated in a particular format as a consequence of

responses to previous text elements. An example of a closing message 84 may be

[0055]   *"After you read through what we send you, please sign and return our*

petition, and please call your state legislators and ask them to support our legislation. So,

please, make your 20-second calls to your legislators. We are counting on you. And please let

us know that you have completed your calls. The materials we send you will tell you how you

can communicate back to us. Thank you very much for being willing to help. Bye."

[0056]   Prospect call page 52 may also include specialize buttons for recording

common user responses or situations. For instance, buttons may include, but are not limited

to, a 'No Answer' button 90, a 'Hung up' button 96, a 'No interest' button 86, a 'Supporter'

button 92, a 'Disconnected' button 98, an 'Incomplete' button 88 and an 'Activist' button 94.

These buttons may send information back to the Call Center Managing System allowing it to

update the prospects database 20, including categorizing the lists that the current prospect

will be used in. The responses sent back may also be used by the call centering managing

13

system to update data on the volunteer database, including updating determinations of the volunteer's productivity and effectiveness.

[0057]   Function button 'Print and Reserve' is used for a further capability of the system in the preferred embodiment of the system. By pushing the 'Print and Reserve' button the volunteer is able to print out all the information normally on the screen and thereby go off line from the Call Center Managing System 10. The managing server 12 will record that the particular Prospect has been checked out and will not reallocate the Prospect to any other volunteers until it has been checked back in or a predetermined time has passed. In the preferred embodiment of the system prospects can be checked out in this manner for a maximum of 24 hours, although the time limit will depend on the nature of the calling campaign being conducted, the type of prospect and the type of volunteer.

[0058]   Figure 4 shows a schematic flow diagram of a volunteer's interaction with the distributed, web-based call system of this invention. In step 102, the volunteer logs on to the system. In the preferred embodiment this may include identity authentication by a user name and password or a suitable biometric system such as, but not limited to, an iris scanner or fingerprint reader. Once logged onto the system, in step 104 the volunteer reads an HTML page served to their browser containing information about the issue that is the subject of the current telephone calling campaign that the volunteer may select to be a part of. In step 106 the volunteer goes on to read about the details of the task assigned to them today. In step 108, the volunteer then elects whether or not they are ready to participate in the assignment and begin making calls to prospects. If the volunteer is ready to begin calling they go to step 110 and access the prospect call page of the first prospect on their call list. In step 112 the volunteer dials the prospects telephone call. If the call connects in step 114, the prospect moves to step 116 and begins a telephone conversation with the prospect by reading the first query or text presented to them on the prospect call page. In step 118, the volunteer records

14

the prospects response to the query. In the preferred embodiment, this recording is facilitated by appropriate HTML features embedded in the prospect call web page such as, but not limited to, check boxes, buttons and pull down menus. The prospect responses may be relayed back to the call center managing system's managing server in real time and used to guide the volunteer/prospect conversation by serving up appropriate text or queries for the volunteer to read. Alternatively the prospect responses may be stored locally on the volunteer's station and sent back as a batch either at the end of a particular volunteer/prospect conversation or at the end of a volunteer session. Having recorded the query response, volunteer goes to step 120 and determines if there is another query or script text element to be conveyed to the prospect. If there is another query, volunteer loops back to step 116 of reading the query. If there is no further query to be read, the volunteer then goes to step 122 of determining if there is any follow up action to be taken. If there is follow up action, the volunteer then goes to step 124 of initiating the follow up action which may for example be, but is not limited to, e-mailing the prospect a package of actionable materials or notifying the call center managing system of a need to send a package of actionable materials by regular mail to the prospect.

[0059]   Once the volunteer determines that there is no further follow up required, they move on to step 126 of recording the call result. This recording may be simplified by check boxes or buttons corresponding to common results such as, but not limited to the prospect not answering, hanging up, having no interest, being a supporter, being an activist or the call being disconnected. The volunteer then moves onto step 128 of updating a prospects record or causing it to be updated. Having completed dealing with a given prospect, the volunteer loops back to step 108 to find if there is another prospect on their to-call list and to decide whether or not to call the next prospect at this time. If there are no new prospects waiting to be called, the volunteer may, in one embodiment of the invention, be automatically forward

to a reserve deck of prospects. This reserve deck may for instance include, but is not limited

to, lists of prospects which previous attempts had been either unsuccessful or only partially

successful or they may represent lists of prospects that for some historical, demographic,

geographic or socio-graphic reason, was not considered to be appropriate to include on the

5   first list of prospects to call. When the volunteer has completed their calls to their allotted

prospects for the day, or when they have used up all the time they can allocate to the task for

the day, they go to step 130 of logging off the system.

[0060]   Figure 5 is a schematic flow chart detailing how the web based distributed call

center processes input from and output to a volunteer station. In step 132 the system receives

10   a log on request from a volunteer user. In step 134 the system determines whether it

recognizes the user. The recognition step 134 may consist of querying a database to see if the

identification presented by the user corresponds to stored data. For instance, the step 134

may consist of checking whether a volunteer is presenting a user name and user password

that correspond to a user name and associated password stored in a call center managing

15   system database. The identification presented and stored may include, but is not limited to,

other systems such as voice-recognition, iris-pattern matching, finger print matching and

other known biometric systems. If the user is not recognized, the system ends the system in

step 136. If the user is recognized, the call center managing system retrieves relevant user or

volunteer data from its historical databases such as its volunteer database. Having obtained

20   the relevant information about the user or volunteer who has logged onto the system in step

138, the system proceeds to step 140 of ascertaining what, if any, task to assign the volunteer.

If their are no tasks currently suitable for the volunteer, the system takes step 142 of

informing the user, then proceeding to step 144 of thanking the user for volunteering. The

system then takes step 146 of updating the user or volunteer statistics. This may include

25   recording that the user volunteered but there was no suitable task and altering selection

16

criteria to improve the chances of the user being given an assignment the next time the user volunteers. If the system in step 140 has an assignment for the user, it proceeds to step 148 of issuing the user a welcome page that sets out the assignment, including the issues and links to background material to help orient and motive the volunteer. The welcome page also · includes, or includes links to, lists of prospects. In the preferred embodiment, these prospect lists have been pre-qualified by automate call systems. The system then waits for a request for a prospect to call. When the system is asked for a prospect to call in step 150, the system proceeds to step 152 of getting the prospect data. This typically consists of accessing a prospects database. Once the system has the prospect data, it generates a prospect call page in step 154. This call page has details about the prospect, including a telephone number, as well as a personalized calling script to guide the volunteer in talking to the prospect. The next step the system takes is step 156 of recording the prospects responses as interpreted by the volunteer. In step 158 the system responds to any action requests such as, but not limited to, sending the prospect an e-mail package or a package by regular mail. Having responding to any action requests, the system loops back to step 150 of checking to see if there is a request for another prospect. When there are no further requests for prospects, the system then issues an appropriate thank you message in step 144 before updating the user statistics in step 146 and then ending the session in step 136.

[0061]   Figure 6 is an exemplary log on page 160. Both administrators and volunteers may see a similar log on page each time they use the system. The administrator may be an internal administrator (also known as a web army mobilizer (WAM) administrator) responsible for administering a system which is capable of hosting a plurality of clients. Each client typically has at least one client administrator to administer their own lists and databases. A WAM administrator may, for instance, set up the system by providing access codes and security settings to allow a portion of the system to be administered by a client

administrator. The log on page 160 typically comprises a field for entering a user name 162 and a field for entering a password 164.

[0062]   Figure 7 is an exemplary administrator's welcome page 168, which may be a client administrator's welcome page. The client administrator typically has system privileges that allow them to manage campaign lists. In addition to a personalized welcome message 166, the client administrator's welcome page 168 typically comprises links that allow the client administrator to create new events 170 or to modify existing events 172, or to add new users 174 or to modify data related to existing users 176. The client administrator may also import data into the system by, for instance, upload data into the prospect database 20 or the volunteer database 22.

[0063]   Figure 8 is an exemplary administrator's list overview page 178, which typically comprises links to existing lists 180.

[0064]   FIG. 9 is an exemplary administrator's list management page 182, which typically contains links which allow the administrator to manage a particular event or campaign. The elements needed to manage a campaign typically comprise a link to add lists 184 to the database, either of prospects to be contacted or volunteers to contact them, a link to edit existing lists 186, either of prospects or volunteers, a link to add a script 188, a link to modify an existing script 190, a link to manage volunteers by assigning the volunteers to a particular event or campaign 185, a link to view statistics related to the calls that have been made 187 and a link to view statistics related to the response obtained 189.

[0065]   Figure 10 is an exemplary administrator's script management page, 190, that typically comprises a text box that allows entry of information describing the issue or event 192, a text box for entry of information that describes the goal of the event 194, a text box for entry of a script to be used by the volunteer in discussing the issue with the prospect 196 and a text box for entry of a question that the volunteer should ask the prospect 198. The

18

administrator's script management page typically has a response area that allows the administrator to, for instance, place and name check boxes such as, but not limited to, a "Yes" check box 193, a "No" checkbox 195 and a "Maybe" check box 197. These checkboxes allow the volunteer to efficiently record a prospect's response.

5   [0066]   Figure 11 is an exemplary administrator's volunteer enrollment and assignment page 200 that typically comprises a field for entering a new volunteer's name 202, a field for entering a new volunteer's phone number 204, a field for entering a new volunteer's e-mail address 206 and a scrollable text area 208 that allows the administrator to assign the new volunteer to particular events or lists.

10   [0067]   Figure 12 is an exemplary administrator's volunteer management page 210 that allows the administrator to oversee the status of volunteers. The administrator's volunteer management page 210 typically comprises identification information for the volunteer 212, such as their name, a check box indicating if the named volunteer is currently active 214, and a check box indicting if the named volunteer is inactive 216.

15   [0068]   Figure 13 is an exemplary volunteer's action page 218 that typically comprises an area containing contact information related to the prospect to be called 220, a message template, which may be a script or a customized message to be read to the prospect 222, and a question to be asked of the prospect 224. The volunteer's action page 218 typically also comprises arrow buttons to display the next contact 228 or the previous contact 226, and

20   response check buttons such as but not limited to "Yes" button 221, "No" button 223 and "Maybe" button 225, for rapid recording of a prospects reaction to the question.

[0069]   As detailed above, in a preferred embodiment of the invention, the call center management system provides web pages containing prospect contact information, conversation scripts personalized to reflect known information about both the volunteer and

25   the prospect, and selectable buttons for recording prospect responses and conversation

outcomes. In a preferred embodiment, the volunteer uses a conventional phone to contact the prospect and to conduct a scripted conversation, based on the material supplied in the web page.

[0070]   The call center management system facilitates follow up actions including e-mailings and regular mailings. These follow up actions may be customized to the prospect based on their recorded responses to the scripts

[0071]   In a further embodiment of the invention, the management system may alter the scripts in real time in response to the prospect responses, providing a computer guided conversation

[0072]   In a further embodiment of the invention, the management system may monitor the volunteers performance and efficiency

[0073]   In a further embodiment the volunteer monitoring may be done in real time and automated motivational actions may be taken, including automatically sending humorous and/or motivational materials, including graphics and audio.

[0074]   In a further embodiment of the invention, the volunteer monitoring may be used to provide automated reward generation for volunteers

[0075]   In a further embodiment of the invention, the volunteer monitoring may result in scoring of the volunteers. This scoring may be kept private, or it may be shared, in whole or in part, with other volunteers to provide a competitive atmosphere.

[0076]   In a further embodiment of the invention, the type and scale of assignment may be customized in real time at the time the volunteer logs onto the system to reflect the historical assessment of that particular volunteer. For instance, a volunteer with a superior record of getting positive responses from a prospect may preferentially be referred prospects considered important to a particular task. Similarly, a volunteer with a superior record of efficiency may be assigned a commensurately larger number of prospects. The managing

20

server may, for instance, run software that ranks both volunteers and prospects, and then use those ranked lists to determine how the prospect lists are distributed. For instance, volunteers may be ranked based on the recorded responses, with higher ranked volunteers being the ones who, on average, obtain successful responses, either in the form of more donations, larger average donations, or more positive commitments to action. The rankings may also be time weighted, with more recent responses counting more than older ones. The prospects may also be ranked by, for instance, their past history of donations or commitments or by their demographics and how those demographics, such as age, gender, income, location and education, relate to a particular issue. Higher ranked prospects reflect prospects that are more likely to influence the outcome of an issue. The managing server software may then preferentially assign higher ranked prospects to higher ranked volunteers.

[0077]   In a further embodiment of the invention, the system is proactive, sending volunteers e-mail or instant messages to encourage them to log on and volunteer for a particular campaign.

[0078]   In a further embodiment of the invention, the system serves up pages containing background or training type material to assist the volunteers. The type and scope of material may be customized by the system to reflect the volunteer's historical experience or assessment. The material may include audio-visual components, including video and audio. So in addition to managing the calling, the system may in real time manage the training of the volunteers.

[0079]   While the invention has been described with reference to the preferred embodiment thereof, it will be appreciated by those of ordinary skill in the art that modifications can be made to the structure and elements of the invention without departing from the spirit and scope of the invention as a whole.

Industrial Applicability

[0080]   In the field of campaign management, there is significant interest in systems

and methods of communications management for a distributed call center. Such distributed

call center systems and method for volunteer mobilization would be of considerable utility as,

for instance, in promoting a candidate during a political election. Such systems and methods

would also be useful in the general fields of marketing and advertising.